

MVP Live - Goal Setting & Tracking

S – Specific
M – Measurable
A – Attainable
R – Relevant/Realistic
T – Time based

Annual Premium Sold Goal:

\$1,000,000

Monthly Premium Sold Goal:

Annual Premium Sold Goal / 12 months = Monthly Premium Sold Goal

$\$1,000,000 / 12 = \$83,333.33$

Weekly Premium Sold Goal:

Monthly Premium Sold Goal / 4 weeks = Weekly Premium Sold Goal

$\$83,333.33 / 4 = \$20,833.25$

Number of Households Sold per Week:

Weekly Premium Sold Goal / Average Premium per Household = Number of Households Sold per Week

$\$21,000 / \$3,000 = 7$ Households Sold per Week

*How do I find this? Export QA/SA Activity, highlight premiums quoted column & look at the average, highlight premiums sold column & look at the total premiums sold

How many households do you need to quote to sell your households sold per week goal?

Of Households Sold Per Week / Your Average Closing Ratio (in a decimal) = Number of Quotes to Complete

$7 / 0.2 = 35$ Quotes per Week

*How do I find this? Use the Marketing Report

How many households do you need to call to meet your quotes per week goal?

Of Households Sold per Week / Your Average Quote Ratio (in a decimal) = Number of leads to purchase or contact

$35 / 0.2 = 175$ households called per week

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How many phone calls will it take to close these sales?

Of households called per week x average number of calls prior to a sale = number of calls per week

$175 \times 15 = 2625$ phone calls per week

How many calls per staff member, per week?

Of households called per week / number of staff members in your office = # of calls per staff member, per week

$2625 \text{ phone calls} / 4 \text{ staff members} = 656.25 \text{ calls per staff member, per week}$

How many calls per staff member, per day?

Of calls per staff member per week / 5 days = # of calls per staff member, per day

$656.25 / 5 = 131.25 \text{ calls per staff member, per day}$